

ADJUSTMENTS USER MANUAL.....	1
ATTACHING SCANNED DOCUMENTS	1
INTRODUCTION	1
TO CREATE AN ATTACHMENT	1
ATTACHING MULTIPLE DOCUMENTS.....	3
SCANNER SETTINGS	4

ADJUSTMENTS USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can attach scanned receipts, invoices, letters, or any other supporting documents to your transactions. The scanned documents will then be associated with the transactions for approvers, auditors, or managers to view online.

Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. You must then browse for and upload the scanned files into the application.

Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the [Department of Administration's Web site](#) for record retention information.

TO CREATE AN ATTACHMENT

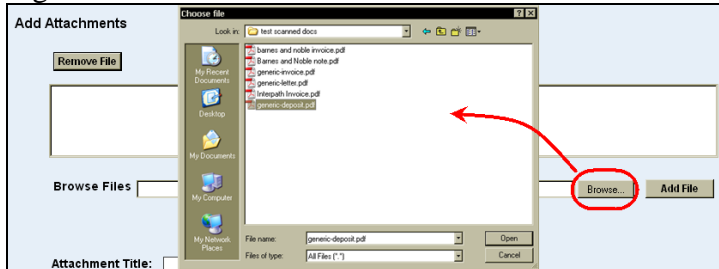
1. If you already have a document open (on the **Document** screen or the **Approval** screen), click the **Attachment** tab. If you do not have a document open, click the **Status** tab, open (**Edit** or **Approve**) a document and then click the **Attachment** tab.

Figure 1 - Attachment tab

The screenshot shows the 'Attachment' tab selected in a navigation bar with tabs for Status, Document, Attachment, Approval, and Reports. Below the navigation bar is a section titled 'Attached Documents' which contains a table with columns: Documents Title, Date, Size, and Action. Below this is a section titled 'Add Documents' which includes a 'Remove File' button, a large empty text area, and a 'Browse Files' label next to a text input field. To the right of the input field are 'Browse...' and 'Add File' buttons.

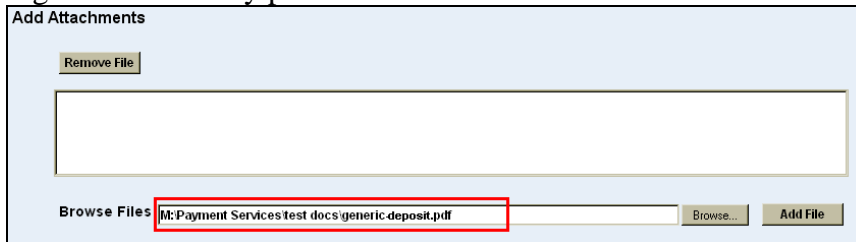
- Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff. (The file extension .jpeg will not work.)

Figure 2 - Browse for scanned document



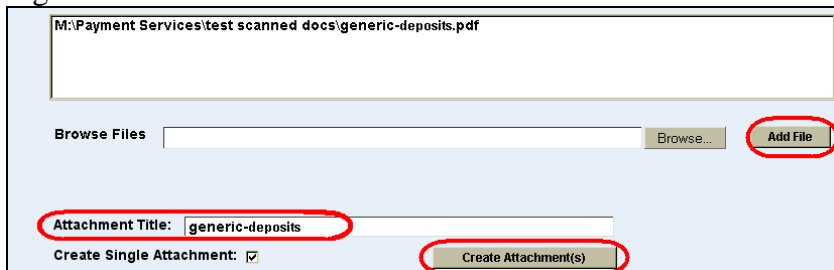
- Highlight the scanned document file and click **Open**. The directory path of the document will appear in the **Browse Files** field.

Figure 3 –Directory path



- Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 4 - Document added



- If desired, change the **Attachment Title** to something more suitable for the document. Otherwise, leave the default title based on the file name.
- For only one document, leave **Create Single Attachment** checked. If you have changed the **Attachment Title**, this will apply the change. For more than one file, see [Attaching Multiple Documents](#) section below.

7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area.
(Click **View** if you want to view the attachment.)

Figure 5 - Attached document with View

Attachments Title	Size	Action
generic-deposit	22K	View

Add Attachments

[Remove File](#)

Browse Files [Browse...](#) [Add File](#)

ATTACHING MULTIPLE DOCUMENTS

You can create attachments from multiple scanned documents either one at a time or all at once. If you create the attachments at one time, you will not be able to enter unique **Attachment Titles** for each one. In order to add multiple documents and give them unique Document Titles, add and create the attachments one at a time.

1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** field remains the same from the first document added. In the example below, the file “generic-letter.pdf” was added, but the name from the first file, “generic-invoice” is still in the **Attachment Title** text box.
2. Continue adding as many documents as needed.

Figure 6 - Adding multiple documents

Add Attachments

[Remove File](#)

M:\Payment Services\test docs\generic-invoice.pdf
M:\Payment Services\test docs\generic-letter.pdf

Browse Files [Browse...](#) [Add File](#)

Attachment Title: generic-invoice

☒ Create Single Attachment [Create Attachment\(s\)](#)

3. Leave **Create Single Attachment** checked or click the check box to clear it. Your choice will affect the **Attachment Title** of the attached documents:
 - a. Leave the checkbox checked, click **Create Attachment(s)**, and all of the documents will have the *same Attachment Title* based on the filename of the first document added.

Figure 7 - Same document title

Attachments Title	Size	Action
generic-invoice	23K	View Delete
generic-invoice	7K	View Delete

Add Attachments

Remove File

Browse Files

Attachment Title:

☒ Create Single Attachment

- b. Clear the **Create Single Attachment** check box, click **Create Attachment(s)**, and the documents will have *different Attachment Titles* based on their filenames.

Figure 8 - Different document titles

Attachments Title	Size	Action
generic-invoice	23K	View Delete
generic-letter	7K	View Delete

Add Attachments

Remove File

Browse Files

Attachment Title:

☐ Create Single Attachment

SCANNER SETTINGS

Several factors must be considered when scanning documents for your agency, – e.g., the type of scanner or multi-function machine you use and its settings, hard disk storage capacity at your agency, and the type of originals (size and color of paper, size and color of print, etc.). Each agency will need to test your own equipment to see which settings create the smallest file size with acceptable visual quality. Two settings often found on scanners and multi-function machines are:

Resolution: Generally scanners will offer a scanning resolution setting expressed in “dpi” or dots per inch. The lower the setting the smaller the file size, but the worse quality of image produced. With most documents, a setting of 150dpi seems to work well.

File formats: Your particular scanner or multi-function machines may be capable of producing a variety of file formats (e.g., .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff). For many agencies, .jpg and .pdf work well.